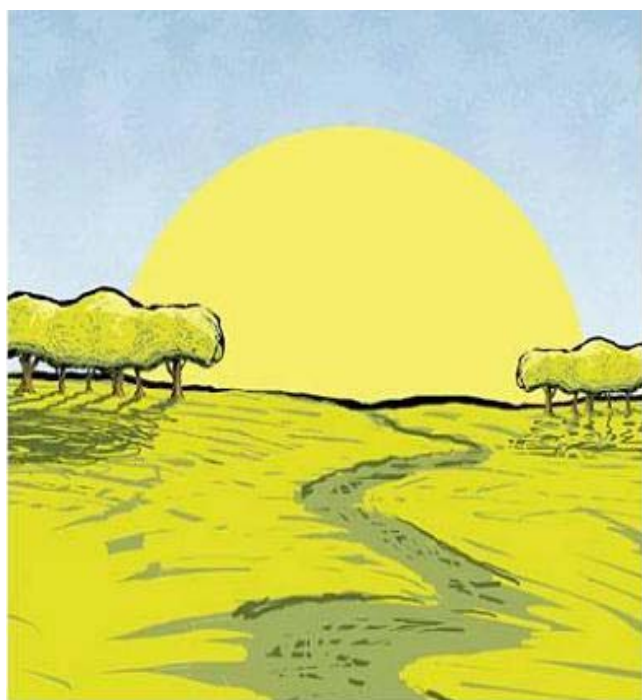




Procedure Guide for File Management VA EIMS Pilot Project (Virginia Educational Information Management System)



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1.0 Introduction

Welcome to the *Procedure Guide* for the VA EIMS File Management Module. This module is part of the Administrative service and allows authorized users to perform the following activities:

- View data file transmission status
- View data file errors for correction and re-transmissions
- View file results for creation of new testing identifiers
- View file results from student matches
- Resolve student match errors during the match and merge process
- Approve files for loading into the data warehouse

The Procedure Guide uses a hands-on approach. That is, it provides a step-by-step process for completing distinct tasks within VA EIMS File Management. Each of these tasks is identified in the Table of Contents.

About this Guide

Scope

The VA EIMS File Management module has two basic components: (1) a file administration component for management of file transmissions and (2) a student resolution component for viewing and resolving student records that could not be matched or determined as new student records.

Access to Administrative Functions

Access to the various administrative functions described in this guide is based on the authorizations that are assigned to you.

► **Not all users will be authorized to perform *all* of the administrative functions described in this guide. If you are not authorized to perform a particular administrative function, an on-screen message will appear when you attempt to access a task, and you will not be able to complete that task. If you feel you should have access, please contact your Division Project Manager.**

Exercise 1 – Viewing File Transmission Results

A. Log in to EIMS

The Virginia EIMS home page is the gateway through which all features and functions of EIMS are accessed. To access the Virginia EIMS home page, follow these steps:

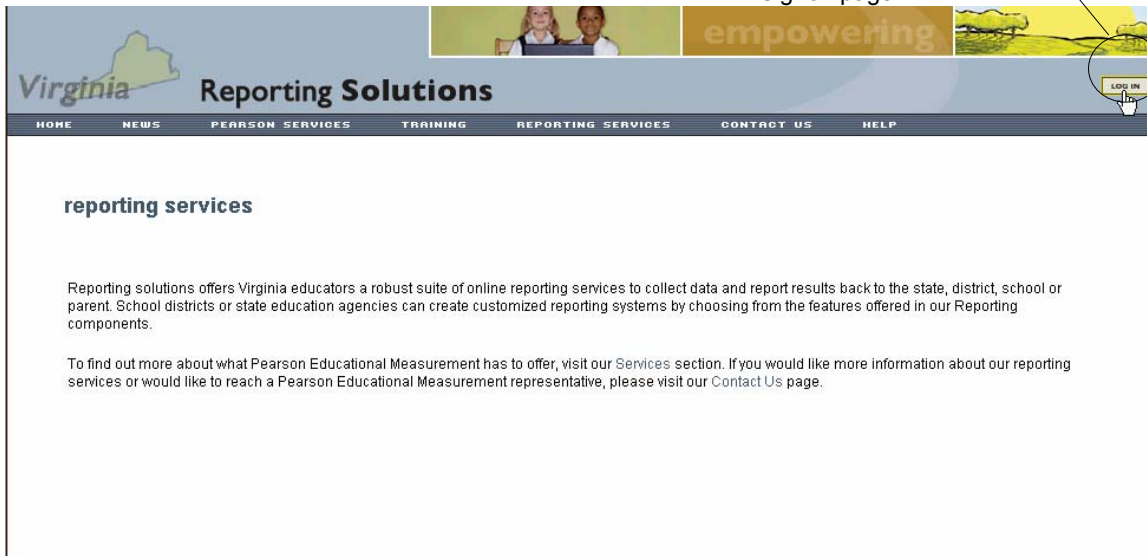
1. Go to <http://www.reporting-solutions.com> to access the Reporting Solutions web site.
2. Click on the *Reporting Services* link in the navigation bar of the Reporting solutions main page to display the VA EIMS Home page.



3. Click on the Virginia image on the United States map to launch the Virginia State page.
4. Click the *Log In* button (Figure 1).

Figure 1 – Reporting Services Home Page

Click directly on the
Log In button to
launch the Single
Signon page



5. Enter your user name and password and click the *Login* button (Figure 2).

Figure 2 – Reporting Solutions Sign-on Page

log in

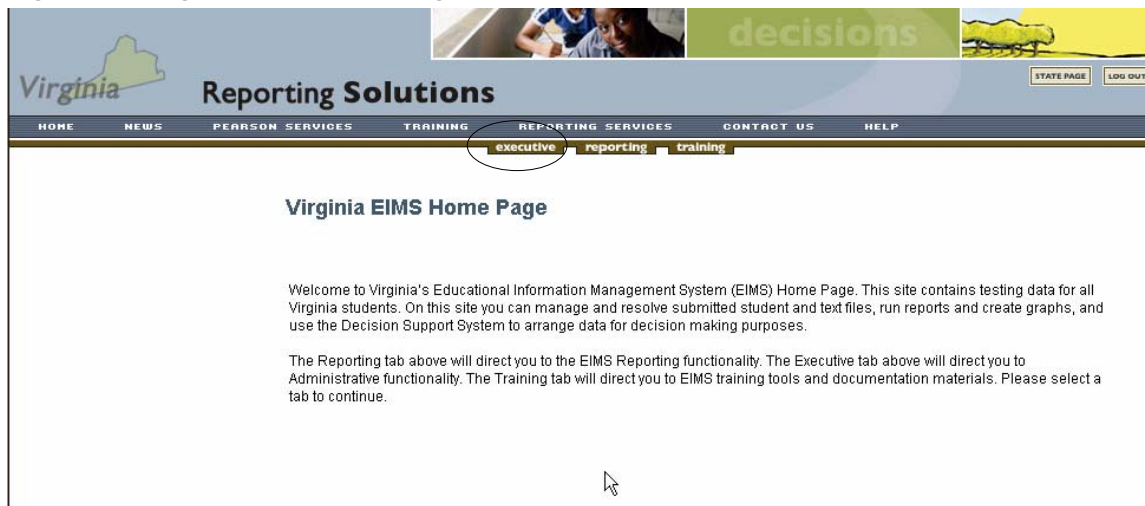
To ensure security, please type your Login ID and password below. Then, click Log In. If you leave the system idle when logged in, you may be required to log in again.

Login ID

Password

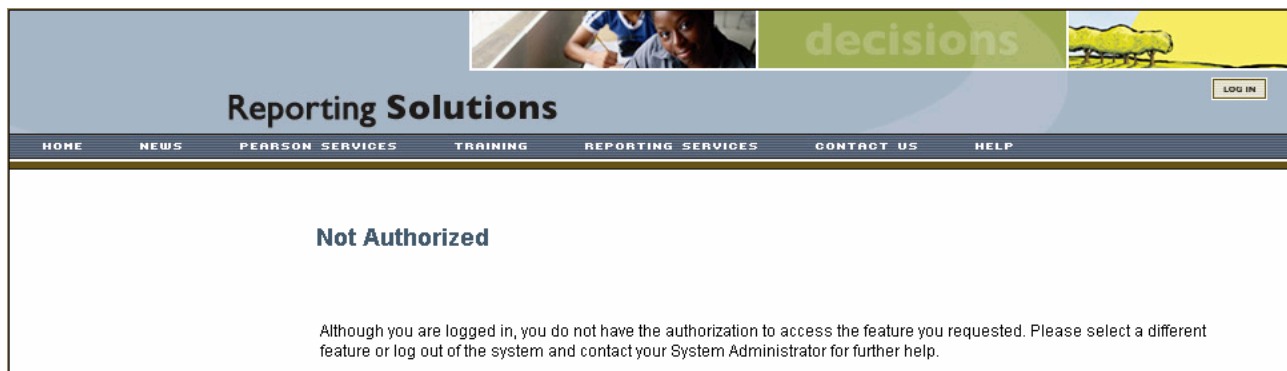
6. Click on the *Executive* button (Figure 3).

Figure 3 – Virginia EIMS Home Page



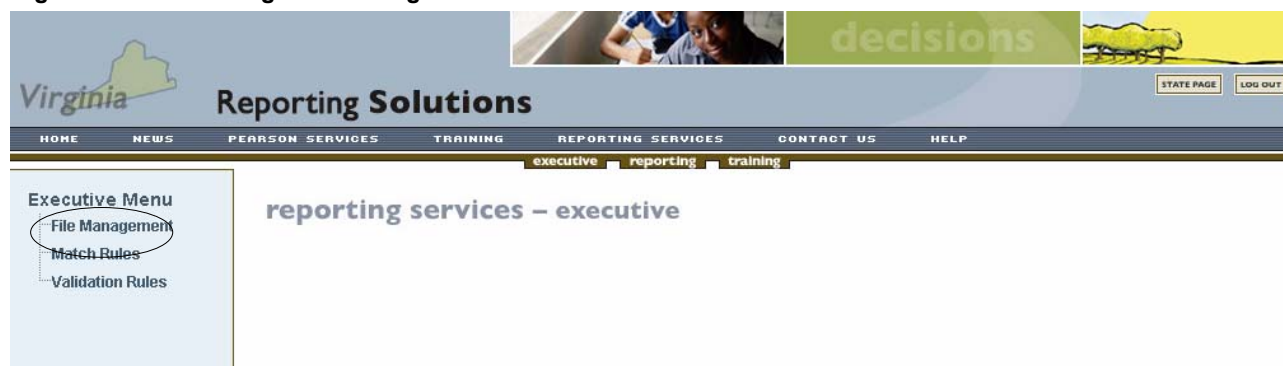
- 7.** If you are not authorized to access Administrative services, the following page is displayed after you click on the *Executive* button to access the File Management Module (Figure 4). If you feel you reached this screen in error and should have authority, please contact your VA EIMS Division project manager.

Figure 4 – Executive Error Message



- 8.** If you are authorized to access the Administrative Module, the following screen is displayed. Click on the *File Management link* to access the File Management Module (Figure 5).

Figure 5 – Accessing File Management



B. Review File Transmission Status

If you are unable to access the File Management, you will need to review the status of files once you have transmitted your data. The types of files that you will be able to monitor include student and test assessment data.

1. You can access File Management from the left navigation bar by clicking on the *File Management* link. (Figure 6).

Figure 6 – File Management

The screenshot shows the "file management" page. It includes a left navigation bar with "File Management" circled. The main content area has a heading "file management" and a sub-heading "View files received in the last 30 Days". Below this is a table of files. Annotations point to specific data points in the table:

- "Total number of records in the file" points to the "Total" column.
- "Number of existing students records in the file" points to the "Matched" column.
- "Number of new students manually resolved" points to the "Unresolved" column.
- "Number of new students records created" points to the "Resolved" column.
- "Number of students records needing to be manually resolved" points to the "Needs Resolution" status.

File Name	Sender Name	Student Record Details				Date Received	File Status
		Total	Matched	New Unresolved	Resolved		
RES11div130_GRADE_09_TR_MA.dat	Sean Palmer	10	0	0	0	2004-04-28	Completed Successfully
013-brunswick-04202004-eng-2003-results.dat	Dan Downs	2402	2402	0	0	2004-04-20	Completed Successfully
115-lynchburg-TT61237-partialjones-DEMO.dat B	TT PRB61237 DEMO FILE	10	1	0	9	2004-04-21	Needs Resolution
115-lynchburg-TT61237-partialjones-DEMO.dat	TT PRB61237 DEMO FILE	10	1	0	9	2004-04-21	Needs Resolution
3NEWdiv130_GRADE_09_TR_MA.dat	Sean Palmer	275	0	0	0	2004-04-22	Needs Resolution

- 2.** From File Management, review your files based on the file-name which identifies each division's files that were transmitted.
- 3.** Review the File Status column for actions.
- 4.** If the File Status says "Completed Successfully," then the file has been approved and loaded successfully in to the Data Warehouse.
- 5.** If the File Status says "In Progress," the file is being processed and is not available to access.
Warning – if the file is "In Progress," status for longer than normal, please contact the Help Desk for possible processing errors.
- 6.** If the File Status says "Rejected," the Division rejected the file and no processing was performed.
- 7.** If the File Status says "Approved," the file is in the process of being loaded into the Data Warehouse.
- 8.** If the File Status says "File Errors," click on the file name link to review the error details. (Figure 7).

Figure 7 – File Details

Executive Menu

- File Management
- Match Rules
- Validation Rules

file details

file information

File Name	File Category	Subject Code	Date Received	Sender Name	Sender Email	Status
3NEWdiv130_GRADE_09_TR_MA.dat	Student Test Record	MA	2004-04-22	Sean Palmer	Sean.Palmer@Pearson.com	File Errors

resolution information

Unresolved Records	Resolved Records	Matched Records	New Records	Total Records
0	0	0	0	275

validation information

Records With Errors	Total Validation Errors
101	102

validation errors

Next>>

Error Number	Line Number	Description
1	1	SCHOOL CODE HAS VALUE <130011> THAT IS INVALID FOR STUDENT <DIAZ, MARIA>
2	2	SCHOOL CODE HAS VALUE <130011> THAT IS INVALID FOR STUDENT <ALDANA, MARILU>
3	3	SCHOOL CODE HAS VALUE <130011> THAT IS INVALID FOR STUDENT <HOGE, SONJA>
4	4	SCHOOL CODE HAS VALUE <130011> THAT IS INVALID FOR STUDENT <REDDY, LOGAN>

Callouts:

- Total number of records in file (points to 275 in resolution information table)
- Total number of errors - 1 record could have multiple errors (points to 101 in validation information table)
- Total number of records in the file with errors. The system will stop at 100 records with errors. (points to 101 in validation information table)

- 8-a.** The purpose of this screen is to enable you to see the errors prior to rejecting the file.
- 8-b.** A message window will be displayed for you to OK the rejection of the file. Click on *OK* to reject the file, and then click on *OK* to confirm the rejection.
- 8-c.** You should make corrections on the Division’s SIS and then extract, rename and resubmit a new file for processing.
- 8-d.** Repeat this process until the file status no longer shows “File Error.”

C. Resolving “Needs Resolution” Status

The status of “Needs Resolution” will be displayed when a file has been successfully loaded but has student records that could not be matched or could not be determined as a new student record.

- 1.** Click on the file name link for the file that is in “Needs Resolution” status. The Student Resolution Screen will be displayed with the student record(s) that need to be resolved. (Figure 8)
- 2.** Click on the Resolve File button to begin the resolution process (Figure 8).

Figure 8 – Students Needing Resolution Screen

Virginia Reporting Solutions

HOME NEWS PERSON SERVICES TRAINING REPORTING SERVICES CONTACT US HELP

executive reporting training

Executive Menu

- File Management
- Match Rules
- Validation Rules

File Selected

File Name	Senders Name	Date Received	Unresolved Records
RES11div130_GRADE_09_TR_MA.dat	Sean Palmer	2004-04-28 10	

Students to be Resolved:

To Resolve a Student, please select their name from the list below.



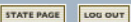
Student Name	Student Code	School Name (School Code)	Grade Level	Potential Matches
GREGORYZ,JOSHUA	0010025208	JAMES RUSSELL JR HS (0130660)	9	1
MARTINZ,DONALD	0010025213	JAMES RUSSELL JR HS (0130660)	9	2
MAYBUSHZ,BENJAMIN	0010025225	JAMES RUSSELL JR HS (0130660)	9	2
BENNETTZ,ANTHONY	0010025227	JAMES RUSSELL JR HS (0130660)	9	2
WILLSZ,CHRISTINA	0010025229	JAMES RUSSELL JR HS (0130660)	9	2
BROWNZ,INDIA	0010024085	JAMES RUSSELL JR HS (0130660)	9	2
DAVISZ,CHIEJIO	0010025232	JAMES RUSSELL JR HS (0130660)	9	2
BALINZ,JESSE	0010025237	JAMES RUSSELL JR HS (0130660)	9	2
GAYLORZ,MATTHEW	0010025239	JAMES RUSSELL JR HS (0130660)	9	2
MCMULLENZ,FELICIA	0010025240	JAMES RUSSELL JR HS (0130660)	9	1

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After clicking on this button to resolve a file, the user will only see the students needing to be resolved based on their security role.

- To resolve each student, click the student name link to review the closest matches for that student record. (Figure 9)

Figure 9 – Students to be Resolved Screen

[HOME](#)
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[PEARSON SERVICES](#)
[TRAINING](#)
[REPORTING SERVICES](#)
[CONTACT US](#)
[HELP](#)

[executive](#)
[reporting](#)
[training](#)

File Selected

File Name	Senders Name	Date Received	Unresolved Records
115-lynchburg-TT61237-partialjones-DEMO.dat B	TT PRB61237 DEMO FILE	2004-04-21	9

Students to be Resolved:

To Resolve a Student, please select their name from the list below.

Student Name	Student Code	School Name (School Code)	Grade Level	Potential Matches
ERINSTUBC,BRANGEOME		DEARINGTON ES INNOV (1150070)	5	3
ERINSTUCC,CORTGEOME		DEARINGTON ES INNOV (1150070)	1	3
ERINSTUDC,QUE GEOME		DEARINGTON ES INNOV (1150070)	4	3
ERINSTUEC,RAVEGEOME		DEARINGTON ES INNOV (1150070)	1	3
ERINSTUFC,TAMIGEOME		DEARINGTON ES INNOV (1150070)	1	3
ERINSTUGC,NADIGEOME		T C MILLER ES INNOV (1150090)	4	3
ERINSTUHC,EMILGEOME		T C MILLER ES INNOV (1150090)	1	3
ERINSTUIC,AISHGEOME		T C MILLER ES INNOV (1150090)	2	3
ERINSTUJC,TALIGEOME		T C MILLER ES INNOV (1150090)	2	3

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Executive Menu

- File Management
- Match Rules
- Validation Rules

Figure 10 – Potential Student Matches Screen

Potential Student Matches

Select a student below to review the student needing resolution against the potential student match's details. Click the "New Student" button to create a new record, or click the "Accept Student" button to update the record.

Student to be resolved:

	Imported Student	Possible Match
Last Name:	GREGORYZ	GREGORY
First Name:	JOSHUA	JOSHUA
Middle Initial:	A	A
School Name (School Code):	JAMES RUSSELL JR HS 0130660	JAMES RUSSELL JR HS 0130660
Grade Level:	9	9
Testing Identifier:	0010025208	0010119558
Disadvantaged Status	No	No
Gender	Female	Male
Migrant Status	No	No
LEP Status		
504 Status		
Race/Ethnicity	White(not of Hispanic Origin)	White(not of Hispanic Origin)
Local Student ID	000230414188	000230414188
Disability Status	Yes	Yes
Birth date	19870606	19870606

[New Student](#) [Accept Student](#)

Possible Matches:

Last Name	First Name	Middle Initial	Testing Identifier	School Name	School Code	Gender	Ethnicity	DOB	Match Weight %
GREGORY	JOSHUA	A	0010119558	JAMES RUSSELL JR HS	0130660	Male	White(not of Hispanic Origin)	19870606	70

The imported student record that you selected from the previous screen is displayed under “Students to be resolved” and displayed under the column heading of “Imported Student”. To view all possible matches for the imported student record, view the list under the page heading of “Possible Matches.” The list of possible matches may be one or many records depending on the match results within the warehouse. Depending on the number of possible student matches, the screen may display a “Next” button allowing you to display the next set of possible matched student records for viewing or selection (Figure 10).

- Click on a student record under “Possible Matches” to display the student’s demographic information under the “Possible Match” column.
- Compare the imported student record demographic information with the selected possible matched student demographics.
- If the “Imported Student” record and the “Possible Matched” student record are determined to be a matched student, click the *Accept Student* button. A confirmation message window appears to allow you to confirm the acceptance of the matched student record.
- If the “Imported Student” record and the “Possible Matched” student record are determined NOT to be a matched student, repeat steps 3 & 4 until a decision is made to either click the *New Student* button which will create a new testing identifier for this student record, or perform further investigation to determine the correct action needing to be taken.

D. Resolving “Needs Resolution Over Limit” Status

The status of “Needs Resolution Over Limit” will be displayed when a file has over 500 student match results. The number of 500 is determined by Virginia as a maximum limit to warn the user of potential problems with the imported record. You can decide to proceed with the resolution process or to reject the file and review the student records for possible modifications due to missing information that is needed for the matching of student records.

1. Select the file with a status of “Needs Resolution Over Limit.”
2. A confirmation window is displayed for you to click *OK* or *Cancel* the process.
3. If you choose to *Cancel* the process, you must click on *Reject* to reject the file in order to review possible problems with the student records, make corrective changes, and then resubmit the file to repeat the file transmission process.
4. If you choose *OK* within the confirmation window, you will follow the process within section B.

E. Resolving “Waiting Approval” Status

The status of “Waiting Approval” will be displayed when a file has been successfully resolved of performing the student match and merge process. This status allows you to approve the file to be loaded into the Data Warehouse for use with the Reporting functionality.

► You cannot view data in reporting until you have approved the file. You must complete this process in order to finish loading student and test records.

5. Click on the *Approve* button.
6. Click on *OK* within the confirmation window to confirm approval of the file.

9.0 Getting Help

For technical support and guidance on how to complete these procedures, please contact the PEM VA EIMS Customer Service Center via phone (toll-free) at 1-888-269-5242 or via email at reportingsolutions@pearson.com.